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MOC's Impacts:

A Description and Evaluation of the United Way of Calgary and area's Multicultural Organizational Change (MOC) Initiative 1991-1996

Executive Summary

November 1997

by: Urmil (Kitty) Chugh - Principle Evaluator
& Niels Agger-Gupta

Alberta
Community Development
Citizenship Services Branch

United Way
of Calgary and area.

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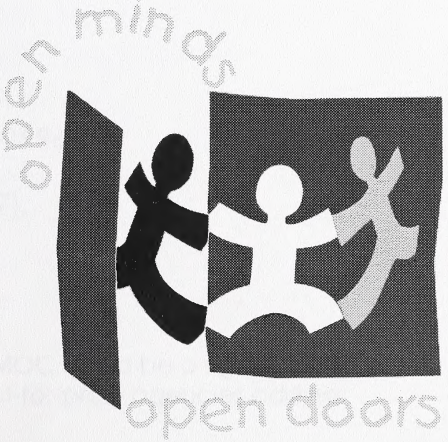

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Canadian Cataloguing in Publication Data

Chugh, Urmil.
MOC's impacts : a description and evaluation of the United Way of Calgary and Area's Multicultural Organizational Change (MOC) initiative 1991-1996 : executive summary

Copublished by: United Way of Calgary and Area.
Includes bibliographical references.
ISBN 0-7785-0122-1

1. United Way of Calgary and Area--Evaluation. 2. Social work with minorities--Alberta--Calgary--Evaluation. I.Agger-Gupta, Niels, 1955- II.Alberta. Alberta Community Development. III. United Way of Calgary and Area. IV. Title.
HV110.C3C584 1998 362.84'006'0712338 C98-910174-6

The complete Final Report is also available - please see the order form at the back of this report

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Alberta
Community Development
Citizenship Services Branch

&

United Way
of Calgary and area

Support for this evaluation came from the:
Alberta Multiculturalism Commission (1993-1996),
Alberta Human Rights, Citizenship &
Multiculturalism Education Fund (1996-1997),
Kahanoff Foundation (1993-1995),
United Way of Calgary & area (1994),
& Canadian Heritage (1994).

Special thanks to these funders who thought MOC could be a significant innovation in the process of helping public, not-for-profit agencies address external and internal accessibility issues.

ACKNOWLEDGMENTS

First and foremost we wish to thank the staff and volunteers of the member agencies of the United Way of Calgary and area that participated in the two applications of the workforce survey, in 1993 and 1996. In the same breath we wish to thank the members of United Way's MOC Committee and the senior management and Board of Directors of the United Way itself. This evaluation would not have been completed without their continued support and commitment. In particular, we wish to thank Ed Johnson, the former President of the United Way of Calgary and area, for ensuring that a participatory community process around multiculturalism and accessibility could find a home within Calgary's United Way.

Thanks are also extended to the multiple funders who made the Multicultural Organizational Change (MOC) project and its evaluation possible and successful in every way: the United Way of Calgary and area, the Kahanoff Foundation, the Alberta Multiculturalism Commission, and the Multiculturalism Programme of Canadian Heritage (Government of Canada). In particular, Niels wishes to thank Marie Riddle, Director of Citizenship Services Branch for supporting the completion of this work, begun under the auspices of the Alberta Multiculturalism Commission. Terry Keyko, Executive Director of the Alberta Multiculturalism Commission from 1993 to 1996, was instrumental in supporting a difficult and seemingly unending initiative which kept requiring more resources. Caterina Greco-Mangone, Co-ordinator of the Commission's *Access* Programme Team (1991 - 1995), was also a key supporter of this initiative. This evaluation was made possible because of Terry and Caterina's enthusiastic support at critical moments early in the development of MOC.

We wish to acknowledge all the other stakeholders who helped in developing the MOC project and its evaluation (including various instruments). Many people participated in both the areas. Appendix (A) provides the names of the people who participated in the MOC project along with their roles. The list, unfortunately, does not include the many people who were active in their own organization's MOC process, other than the agency representatives and change agents who participated on the various committees at United Way.

Lastly, we gratefully acknowledge the contributions of the following individuals who were not directly involved in the MOC project: Dr. Tak Fung in University Computing Services, the University of Calgary for his advice and assistance in conducting statistics at the mainframe of the University of Calgary, Jocelyn Lockyer, the Director of Continuing Medical Education and Jacky Price (a friend) for reading several drafts of the evaluation report. Special thanks to Aliya Khan for her help in entering the workforce survey data into the SPSS program and Patty Read for her help in typing tables.

PREFACE

In 1990 the **United Way of Calgary and area**, through both a **Multicultural Task Force** and a community initiative called **Futureways**, needed to find ways to demonstrate that the organizations they funded could reasonably address and meet the larger community needs. The function of both the Multicultural Task Force and Futureways was to highlight the need for services to vulnerable groups, initiatives which worked on preventing social crisis in the first place, and the area of accessibility generally. The current study originated as part of the **United Way of Calgary's Multicultural Organizational Change (MOC) Board Committee's** development of a massive, multi-organizational, three-year long, change initiative. This pilot program was intended to help United Way funded agencies to understand and address the organizational barriers which obstructed the provision of services to members of the more than 65 ethnocultural communities in Calgary, Alberta, Canada.

As the initiative took shape over the course of 1991, a group of us recognized the MOC initiative was an unprecedented opportunity to study an "organizational change for diversity" initiative in Calgary, from conception through implementation across a variety of organizations in the not-for-profit human services sector. A participatory approach to studying the MOC initiative from a variety of perspectives was considered an ideal way to develop a better understanding of the change process in organizations trying to address systemic barriers to people from diverse ethnocultural, racial and linguistic backgrounds.

The MOC Committee, from its beginning in 1991, was represented by members from the diverse communities of Calgary as well as staff from the **Alberta Multiculturalism Commission** (AMC). The AMC had the mandate, between 1990 and 1996, through its *Access* direction, to, "assist public institutions, businesses, industries and organizations to develop operations and services that are available and appropriate to the needs of all Albertans." To that end, the AMC set a priority on working with the health, education and municipal services sectors. The AMC sought quantitative as well as qualitative research-based information in these areas to support and demonstrate the need for professional action on diversity matters, particularly at a time of fiscal restraint. The MOC initiative and its evaluation became a collaborative venture between the United Way and the AMC. The MOC process was the single largest systemic change initiative in the province for the AMC in its eight year history. In 1992 the **Kahanoff Foundation** also contributed a significant amount of financial resources into the MOC work in Calgary as part of a four city national initiative involving the United Ways of Metro Toronto, Halifax and Vancouver. The federal department of **Canadian Heritage** also contributed to the completion of the evaluation of the MOC initiative.

Participants, including project planners, agency representatives and diversity stakeholders had (and continue to have) many questions about the MOC process. What should organizations do, or not do, in order to develop an organizational culture that values diversity? How can agencies provide effective services to the broad range of people from diverse backgrounds in Calgary? Are there measurable indicators of success in this kind of process? What kind of resources, both human and financial, will this process take? What is the relationship between accessible front-line services and the acceptance of diversity within the organizational culture? When is the process considered "finished"? Will participating in MOC help agencies get funded by the United Way?

Aside from the broader organizational change literature, there was only one Canadian example to point to in 1991 - the YWCA of Metro Toronto (described by Thomas, 1987), and this example left many questions still unanswered. How would such a change process actually work, here in Calgary? Between the beginning of the implementation at the agency level in 1992/93, and the last workforce survey in 1996, many more questions were raised, and the evaluation of MOC took many forms, including the development of a "Stakeholder's Group" of participants at the agencies, to attempt to come to a better understanding of the key variables in the MOC process.

This report provides some answers, but in no way is the final word on "diversity change" - many significant questions remain unanswered and await further study. Clearly the context of the initiative, here in Calgary in the human-services, in the 1990s, played a confounding role in the many outcomes of the initiative. The understanding of the purpose of MOC continued to expand, initially among the members of the MOC Committee and then among the participants at the agency level. As the initiative progressed it became evident that the issue of barriers existed in other areas - such as gender, age, disability, religion, education, geographic region, and so on. The working definition of "diversity" was expanded to include these dimensions.

The MOC Committee, (chaired by Talib Nanji and given day-to-day life by the co-ordinator, Carole Holmes), created an Evaluation Committee to develop a participatory evaluation model. To that end, the committee selected Philip Cox and his associates from **Plan:Net Management and Consulting Network**, a local consulting organization. Philip Cox worked tirelessly throughout this evaluation to bring in a participatory evaluation model to bear on the MOC project evaluation. This approach brought together stakeholders with a variety of interests and perspectives in every phase of the evaluation: instruments development, data collection, data analysis as well as report writing.

The principle author of this report, Urmil (Kitty) Chugh, was a researcher initially hired by Plan:Net to implement the survey instruments designed in the spirit of the participatory model. Kitty analyzed the massive amounts of quantitative and qualitative data collected through these surveys. When Phil Cox, the initial researcher/consultant, decided to return to school in 1996, Kitty ably stepped into the lead role for the final chapter of the MOC evaluation. Kitty helped participants, often managers of agencies, see the practical value of basing decisions on the empirical data supported by the research - as an alternative to intuitive, 'gut-reaction' responses to issues in diversity. Kitty feels she did not do anything earthshaking, just her usual set of tasks as a researcher: collecting, sorting, describing, documenting, converging information and interpretation of the survey results.

Wendy Charlton and Narmin Ismail-Teja, the training co-ordinators took over the co-ordination of the MOC project in 1995 when Carol Holmes left the project. By 1996 MOC had expanded considerably from the original 16 agencies to approximately 50 agencies in Calgary. Wendy and Narmin left the United Way of Calgary and area to continue the MOC work through their Diversity Learning Institute (DLI) in 1997.

Niels Agger-Gupta, a consultant with the Multiculturalism Commission/Alberta Community Development, was involved throughout the MOC process- on the MOC Committee, on the Evaluation Committee and other working subcommittees, and finally, as the project officer and one of the co-ordinators of the evaluation itself. Niels was not involved in the actual MOC training intervention with the participating agencies or in the data collection phases. Niels was concerned throughout the evaluation with understanding how participants at the agencies and the United Way itself integrated their understandings of addressing Calgary's diversity with their actual day-to-day work, rather than seeing this as an add-on to an already overburdened schedule. Niels found that the challenge of using positivistic research in a participative, qualitative context led to many significant intellectual stretches.

It became evident that many participants realized a "paradigm shift" during the course of their involvement with the MOC work, and that many understandings of what "accessibility" was about, changed significantly between 1992 and 1996. This created significant challenges for the evaluation team, as the nature of the investigation was constantly modified. The researchers' own growing understanding of the concept of "open" organizations both limited and expanded the scope of the study simultaneously.

The Executive Summary is complete with the core tables and appendices, for readers just wishing an overview of the study. This document has been made possible due to the efforts of many people, and reflects the skills and personal journeys of countless stakeholders

in over 16 agencies in Calgary. The first section describes in depth the philosophy, planning, development and implementation of the United Way of Calgary and area MOC project. The second section deals in depth with the impacts of the MOC project on the internal and external environment of the member agencies. In the process of analyzing the workforce data from both the 1993 and 1996 applications, we employed all three modes of inferential statistics: univariate, bivariate and multivariate. In addition, to capture the essence and the richness of the voices and perspectives of people at the agencies on the effectiveness of the MOC initiative, we collected open-ended qualitative data.

Individuals who are interested in the topics of institutional change addressing diversity, and systemic barriers and discrimination, will hopefully find that this summary provides some guidance in the areas of policy development and organizational change implementation. This summary and the complete Final Report (which is distributed separately) should also be of interest to those responsible for designing change interventions in their organizations. This evaluation is not a critique of specific training methodologies and interventions, but rather, attempts to understand the nature of the changes at the participating agencies over time.

Urmil (Kitty) Chugh
Niels Agger-Gupta
October 29, 1997

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A GLOSSARY OF KEY TERMS AND CONCEPTS

The following terms are used throughout the length of this report. It is essential, then, that the readers become familiar with their meanings and definitions. The evaluators are cognizant of the fact that some of the meanings of concepts defined below (sexist remarks and racist remarks) are subjective. For instance, people differ in their assessment of whether or not a remark is a racist remark or not.

- **Attitude** is *"a way of thinking and the resulting behaviours which are based upon underlying philosophies and assumptions, many of which are operating at an unconscious level. These attitudes are based on attributions derived from the interpretation from past experiences and limit what is seen to occur around the individual, even on a factual level"* (cited in Agger-Gupta, 1997, p. 15).

- **Backlash** is "*an angry group response to what is seen as a threat or provocation"* (cited in Agger-Gupta, 1997, p. 16).

- **Barriers** are *"real and/or perceived obstacles and problems which limit or impede equal access to and participation in any service or programme"* (cited in Agger-Gupta, 1997, p. 17).

- **Benchmark** *"is a standard or point of reference in measuring or judging quality value etc."* (Woolf, 1980, p.102).

- **Benchmarking** *"is the comparison of similar processes across organizations, companies and industries to identify best practices and set improvement targets. Companies benchmark to see where they stand today, how they actually spend their time and add value. In addition, benchmarking identifies high-potential improvement opportunities and help in scoping a transformation program and selling the need for change. Benchmarking also lets companies learn what other forward-thinking companies are doing differently and better"* (http:\\www.cma-canada.org/english/cma67.html).

- **Diversity** is defined as *"all the ways we are unique and different from others." The term describes the differences that exist within Canadian society, across all four levels of diversity - individual, team/organizational, professional and societal"* (cited in Agger-Gupta, 1997, p. 34).

- **Effectiveness** *"often, but not necessarily used to refer to the conclusion of goal/achievement evaluation, with all its limitations. Success is roughly equivalent to this sense. Effectiveness can be construed more generally as referring to achieving an outcome...it always refers to a goal,.... It is a means and end notion"* (Scriven, 1991 p. 129).

- **Efficiency** *"goes beyond effectiveness by bringing in a reference to the amount of resources involved. It implies the absence of wastage from inputs to outputs. To that end efficiency question(s) measures wastage (or lack of it) from the input to the outputs"* (Scriven, 1991 p. 129).

- **Empowerment** is *"a feeling of capability, self-assurance and motivation to access resources and pursue a goal to its conclusion.. Empowerment can be self-initiated or the result of support and attention on the part of the others"* (cited in Agger-Gupta, 1997, p. 35).

- **Equity** is defined as *"fairness and justice, especially the common fairness that follows the spirit rather than the letter of justice.... Equity also involves looking at power relationships between people to flatten the playing field and facilitate an equitable outcome"* (cited in Agger-Gupta, 1997, p. 36).

- **Ethnicity/Ethnic background** is *"the condition of belonging to a social group with a cultural and social system that claims, or is accorded, special status on the basis of religious, linguistic, ancestral or physical characteristics"* (cited in Agger-Gupta, 1997, p. 36).

- **Ethnic Minority** *"refers to an ethnic group which is represented by fewer people than the ethnic majority. The term is a descriptive one and is not used to confer power or lack of power, on any particular ethnic group"* (Chugh et al., 1994, p. 32).

- **Impact** is a *"change in current or established economic, demographic or social condition that is 'caused' by the introduction of a development of some kind"* (Chadwick, Bahr and Albrecht, 1984, p. 239). In this report the term is used synonymously with four other terms, difference, change, influence and outcome.

- **Intervention** *"is [an act of coming between] as an influencing force; to modify, settle or hinder some action, argument. In the context of diversity, an intervention is most often thought of as training of some kind, but, in fact there are many different kinds of interventions at the different levels of diversity - individuals, group/team/organizational, professional, and societal"* (cited in Agger-Gupta, 1997, p. 46).

- **Intolerance** is defined as *"unwillingness to endure and/or lack of respect for the beliefs and practices of an individual or group by another individual or group. Racial intolerance refers to the unwillingness to permit equal opportunity and full societal participation to members of racial groups; religious intolerance is the unwillingness to endure those of other religious beliefs"* (cited in Agger-Gupta, 1997, p. 46).

- **5-point Likert Scale** is usually employed to measure attitudinal items. For instance a question is asked: on a scale of 1 to 5 how do you agree (5="strongly agree" and 1="strongly disagree") with the item "There is commitment at the top to open the organization". This attitudinal variable is usually treated as an interval variable. For instance, the distance between 1 and 2 is considered equal to the distance between 3 and 4.

- **Paradigm** is defined as *"a scheme for understanding and explaining certain aspects of reality"* (cited in Agger-Gupta, 1997, p. 57).

- **Paradigm Shift** is defined as a *"distinctly new way of thinking"* (cited in Agger-Gupta, 1997, p. 57).

- **Racist Remark/Racial Slur** is *"an insulting or disparaging statement directed at a particular racial group"* (cited in Agger-Gupta, 1997, p. 62) .

- **Reverse Discrimination** is *"the perception that employment equity or political correctness is causing members of the traditionally dominant cultural group (historically Euro-Canadians or more specifically white Anglo-Saxon males) to be discriminated against. Often this is a perception of opportunity denied of minorities unfairly hired or promoted over more qualified white Canadians"* (cited in Agger-Gupta, 1997, p. 66).

- **Self-identified Visible Minorities** are those Canadians who consider themselves as belonging to visible minorities. This group can and may include disabled, people of colour and sometimes even homosexual Canadians. This variable was derived for this study through the study instrument (from the current evaluation).

- **Systemic Discrimination** is an act (policy and practice) of intentionally or, most often unintentionally, excluding, limiting or discriminating against individuals not part of the dominant group in a social or organizational setting (adapted from Agger-Gupta, 1997, p. 71) .

- **Sexist Remarks/Slur** is an insulting remark or disparaging statement directed at a particular gender. This reflects prejudice or discrimination based on sex, especially against women (adapted from Agger-Gupta, 1997, p. 68).

- **Variable** is *"the phenomenon that is being studied. Usually it occurs at different levels of intensity (or different categories) and thus the label variable"* (Chadwick, Bahr and Albrecht, 1984, p).

- **Visible Minorities in Canada** are those people who are not of white/European or Caucasian ancestry. This group is a subset of the self-identified visible minority group in the current evaluation (adapted from Agger-Gupta, 1997, p. 81).

EXECUTIVE SUMMARY

1.0 The MOC Project

In January, 1990, the Board of Directors of the *United Way of Calgary and area* created a Task Force with the mandate to *"develop relationships with the 'minority communities' in order to assess social service needs and participation requirements of minority communities; increase opportunities for volunteerism; broaden the donor base of the United Way; and remove perceived or actual barriers to accessing United Way and member agency services".*

By the end of June 1992, the Board Committee of the United Way of Calgary and area developed the following vision:

> *That the United Way of Calgary and area be a model for Multicultural change, reflective of the diversity of the community, culturally sensitive and free of cultural barriers."*

This vision was further translated into two goals:

1. *To foster and promote the full participation of ethnocultural groups in the United Way by dismantling visible and invisible organizational barriers.*

2. *To develop a Catalyst-Connector role for multicultural change among member agencies, non-member agencies and the diverse communities.*

The above initiative was considered timely because the United Way and many segments of the Calgary community (e.g., women's movements groups, groups for disabled, immigrant-serving organizations) observed that more and more Calgarians were "slipping through the cracks" and receiving inadequate or inappropriate services, if any services at all. Prior to the MOC (Multicultural Organization Change) project, often, the provision of services for diverse communities was seen as an "extra," or an "add-on," the costs of which took away from the agency's "real" work in the Calgary community. Another common concern at the time was a perceived need for translating printed materials into other languages. To go a step further, in 1991 organizational change initiatives specifically targeting accessibility, inclusion and diversity issues were new even to Canada as a whole in 1991.

The MOC process represented an opportunity for the United Way of Calgary and area, the Alberta Multiculturalism Commission, and other funders, to learn about how issues of systemic barriers could be addressed. Thus, MOC became a new way to understand and measure diversity.

Specifically, the MOC process operated in pursuit of two organizational change outcomes:

a) **internal** change - resulting in a climate where staff and volunteers from diverse backgrounds, circumstances and experiences can work together effectively, and

b) **external** change - where programs and services are more accessible to a wider range of potential users.

Ultimately, between 1992 and 1996 over 40 agencies in 5 "clusters" of agencies were involved in the multicultural organizational change (MOC) process, 20 trainers and over 250 agency change agents were trained, over 3,000 staff and volunteers were involved in the MOC work at the level of "clusters", individual agencies, and the United Way of Calgary and area. Over 75,000 clients of participating agencies were impacted by the changes. Clusters were groupings of organizations that entered the MOC process voluntarily.

Funding for the MOC project came from the United Way of Calgary and area, the Kahanoff Foundation, the Alberta Multiculturalism Commission, and Canadian Heritage (Government of Canada). Funding for the evaluation came principally from the Government of Alberta, through the Multiculturalism Commission and Alberta Community Development, Citizenship Services Branch, as well as from the Kahanoff Foundation, the United Way of Calgary and area, and Canadian Heritage.

Figure 1. An Overview of MOC's Tasks

The MOC Tasks

1. To establish an organizational change model to assist participating "mainstream" agencies to adopt a method for assessing barriers to access, and to implement a change process that addresses the following objectives:

- **(Attain agency) commitment to Multicultural Organizational Change** [e.g., Agency orientation to "Diversity" and MOC process, Cluster Group Formation]
- **Conduct Barrier Analysis**:
  - -Prepare Agency [i.e. Internal Change Team, Agency Communication Planning]
  - -Collect and Analyze Demographic Profiles [i.e., of community, agency staff and volunteers]
  - -Conduct a Systems Review and a Cultural Audit [i.e., agency self examination of governance, management systems, structure and organizational culture]
  - -Review (agency) documents [i.e., agency self-examination of written and visual materials]
  - -Consult with Community [i.e., agency self-examination of existing agency relationships and reach in the community]
  - -Document Success Indicators [i.e., keeping track of successes in the change process]
  - -Produce Final (agency) Reports [i.e., identifying agency barriers and recommending ways of dismantling them]
- **Develop a Strategic Plan** [i.e., integrate results of barrier analysis in agency planning]
- **Implement a Strategic Plan**

2. **To develop support services** for the MOC Process: (United Way MOC Services)

- **Sustain Cluster Work** [i.e., Admin Support/Facilitation/Consultant Support]
- **Provide Resources** [i.e., Resource Centre, In-house Production]
- **Evaluate Progress and Process** [i.e., Assessment Tools & Survey Instruments]
- **Develop Training Team to Support MOC**
- **Provide Partnership Grants (United Way) to Facilitate Collaborative Programming**

2.0 MOC Evaluation

Since the inception of the MOC project in 1990, a series of formal and informal research designs were established to evaluate MOC's effectiveness in its formation and development phases. This was an attempt to ensure smooth progression/implementation of MOC. These step-wise evaluation exercises have produced several documents which can be found at DLI (Diversity Learning Institute) [1]. This report contains an account of MOC's impacts/outcomes between 1993 (baseline assessment) and 1996 as reported by the staff and board of the 14 agencies [2]. The Discussion section in the Complete Report (Part 2),

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[1] These can be found in the DLI (Diversity learning Institute) which is housed and supported by The United Way of Calgary and Area.

[2] The administration and filling out of the workforce survey began at the end of 1993 and continued till the early 1994. The evaluators have considered 1993 the year of the baseline study.

however, does allude to the other evaluation pieces conducted before this current piece.

In 1993 staff (n=475) and volunteers (n=611) of 16 agencies completed a workforce survey designed to build staff and board attitudinal and demographic profiles of their consumers. This baseline survey was followed up by an impact survey in 1996 to determine attitudinal and demographic changes in staff and board and only demographic changes in consumer populations. Staff and board of 14 out of 16 agencies (two agencies declined to take part in the 1996 survey) participated in the impact survey composed of the same three components as the baseline survey: staff, n=258; board, n=55.[3]

2.1 MOC's Impacts on Four Levels

First and foremost, between 1993 and 1996, the organizational change process affected the **organization (i.e., structure, systems, values and skills)** most prominently, but also had a secondary, or "ripple", effect on **personal being (e.g., personal awareness)** on the staff and board, **professional practices** and lastly on the **consumers/community**.

Content analysis of open-ended comments revealed that the majority of impacts associated with MOC were **positive** on the following four counts: a) organization (e.g., education/awareness, policy initiatives), b) personal being (e.g., personal awareness), c) professional practices (e.g., services to diverse clients) and d) Calgary's health and human services (e.g., open agencies) [4].

Like any other large and complex human service project with multiple perspectives and issues, some respondents felt that the MOC project had **negative impacts** or **no effect** on their organizations, personal being, professional practice as well as on the community. Lastly, some respondents were **ambivalent** about MOC's impacts on all four counts. This is not to imply that same respondents were negative or ambivalent on all four counts. To illustrate negative feelings, some board and staff were concerned about reverse discrimination against the dominant culture. This came as a negative externality (unintended outcome) of the MOC project. Some respondents openly questioned the lead role played by the United Way in this process. Some agencies felt that the United Way had conflicting interests in conducting the MOC project. This dilemma may have already been mitigated by the advent

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[3] These two agencies, however, did complete their cluster meetings, i.e., they had completed their "exposure" to the MOC process.

[4] "Content analysis involves systematically coding messages or information in them, into categories [or themes] thus allowing quantitative analysis" (Chadwick, Bahr and Albrecht, 1984, p. 239).

of the Diversity Learning Institute (DLI) in January 1997. Tables B-1 to B-4 (Appendix B) outline results of the content analysis. The four tables outline positive, negative, "no effect" and ambivalent themes along with their sub-themes (e.g., personal awareness is a positive sub-theme in Table B-2) and their weighting (the proportion of comments made on the issue).

2.2 MOC's Impacts on Various Sub-groups

MOC had differential impacts on various sub-groups. The following passages describe salient attitudinal changes in seven sub-groups (male, females, managers, non-managers, "self-identified visible minorities" - abbreviated as the VM sub-group, "other than self-identified visible minorities" - abbreviated as the NVM sub-group, and board members) between 1993 and 1996 [5]. **One-way analysis of variance (ANOVA)** was conducted to determine attitudinal changes between 1993 and 1996 within each of the seven sub-groups. These changes are discussed with reference to four attitudinal constructs/factors (a factor is a constellation of variables which are all related to a latent dimension or construct) resulting from **factor analysis** of the 22 attitudinal items common to both the 1993 and 1996 surveys. Figure 2 presents the four factors extracted from the 22 items. See Table B-5 (Appendix B) for the items that form the four factors/constructs [6].

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[5] The first six sub-groups were extracted from the staff respondents in both the surveys. Due to a relatively small sample size the board sub-group was not broken into further categories. The two staff sub-groups namely the "self identified visible minorities" and "other than self-identified visible minorities" were extracted from binary responses to the following question in both the surveys: I consider myself a visible minority in Canada. – Yes – No.

Findings revealed that there is a higher proportion of disabled and non-white respondents in the former sub-group compared to the latter sub-group. The complete report includes the compositions of the seven sub-groups and the reasons for probing into there experiences and attitudes in this evaluation.

[6] To learn more about the rationale for selecting ANOVA and factor analysis in this evaluation and their algorithm refer to Norusis, M. J. (1990). SPSS Base System User's Guide. Chicago: SPSS Inc.

Figure 2. The Four Factors Extracted From 22 Items

The Four Factors Solution

- **Freedom to Speak up on Sensitive Issues (7 items)**
- **Management Dedication to Organizational Openness (9 items)**
- **Bringing Down Barriers to Hiring/Promoting (3 items)**
- **Personal Dedication to Organizational Openness (3 items)**

Regarding Construct 1, *Freedom to Speak up on Sensitive Issues (7 items)*, all the seven sub-groups reported an increase in "racist remarks" between 1993 and 1996. Only non-managers, males and NVM sub-groups reported an increase in "sexist remarks" during the same time period. The VM sub-group also saw an increase in "confusion about how to communicate with people who appear different" and "conflict when diversity issues are raised in their organization". Lastly, the VM sub-group felt that their "co-workers need to be more understanding of how people in minority groups feel". These findings suggest that most of the sub-groups feel more free to speak up on sensitive issues. In particular, the VM sub-group seemed to express signs of empowerment. This is an exciting step towards embracing diversity and including all (at least as many as possible) voices in formulating organizational policies and future planning. The stakeholders also asserted that awareness and empowerment are just one part of the diversity equation. Without concomitant management dedication and safe environment this gain in freedom of speech could be short-lived. A stakeholder in the March 19, 1997 meeting said:

> *How do we create an environment where those kinds of discussions can be had in an honest way? If you take me half the journey, you're telling me I can speak, have a voice, and I'm going to start taking risks - and there is nobody there to catch me when I fall - then I would judge this as unethical, in my opinion.*

Regarding the Construct 2, *Management Dedication to Organizational Openness (9 items)*, the VM sub-group out of the seven sub-groups did not report any changes in the construct between 1993 and 1996. The stakeholders put forth several reasons to explain this finding. All of the reasons discussed suggest that the VM staff came to this process (in 1993) with different issues, expectations and circumstances.

Still speaking of the Construct *Management Dedication to Organizational Openness*, the non-managers saw a decrease in "commitment to change at the top of the organization" between 1993 and 1996. Did the energy required to sustain diversity initiatives wane by

1996? Do non-mangers and managers have (or have to have) different foci based on their respective job descriptions and responsibilities? Do managers have their hands full in addressing the other organizational issues e.g., less funding, etc.?

Regarding Construct 3, *Bringing Down Barriers to Hiring/Promoting (3 items),* in the 1996 survey all seven sub-groups, by and large, renewed their commitments to *Bringing Down Barriers to Hiring/Promoting*. The use of the term "renewed" is deliberate because a relatively strong commitment was gleaned even at the baseline stage (1993). In 1996 all sub-groups made an even stronger statement that they "would not have difficulty being supervised by and working with someone from a different ethnic background, sexual orientation and opposite sex". (Statement in the quotes represents three items in the 1996 survey.)

Regarding Construct 4, *Personal Dedication to Organizational Openness (3 items)*, none of the sub-groups increased their *Personal Dedication to Organizational Openness*. The above evidence can possibly be explained by both or either of two arguments: a) both the staff and the board are waiting to see workings of the "hypothetical" fully open organization; and/or b) notwithstanding the above, diversity is only one among several different organizational issues. While the latter explanation probably depicts the state of affairs accurately, the former also has elements of truth. The question is: how high a personal priority is required to take action on respecting and accepting organizational diversity? This is at best a question of judgement.

2.3 MOC's Impacts on The Organizational Relationships

In the wake of MOC some organizational relationships have changed [7]. Evaluators revealed these changes by using **one way analysis of variance (ANOVA)**. Notably, in 1996 the VM respondents showed signs of empowerment. For instance, in 1996, the VM sub-group (compared to NVM sub-group) were more *free to speak up on sensitive issues*, to point out deficiencies in their *management's dedication to organizational openness* and also placed a higher "personal priority on openness".

Still on the subject of relationships, in 1996, females (compared to 1996 males as well as 1993 females) were significantly less inclined to work with male supervisors and bosses. Findings revealed that in both 1993 and 1996 a lower proportion of female staff (21%) were in management positions compared to the male staff (35%). These statistics did not change between 1993 and 1996.

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[7] These are statistical relationships rather than human relationships.

2.4 Changes in the Participating Agencies

Only nine out of 15 participating agencies had adequate sample sizes to analyze agency specific data to determine changes manifested in each agency in light of the four factors/constructs [8]. Note, selected items in each of the four constructs were used to conduct this analysis.

For Construct 1 (*Freedom to Speak up on Sensitive Issues*), staff of five agencies did not witness any significant changes (neither increase nor decrease) in frequency of "racist and sexist remarks" as well "as treatment of their colleagues based on their appearances" between 1993 and 1996. Another two agencies reported an increase in "noticing" that their "colleagues are treated differently (unfairly) based on their appearances (e.g., colour, disability)" between 1993 and 1996. One out of the remaining two agencies' data revealed that their staff had "noticed" a significant increase in all of the three events between 1993 and 1996. Lastly, the staff of the remaining agency reported an increased incidence of "racist and sexist remarks" in their organization.

For Construct 2, staff of three agencies reported that there were no significant changes in *Management Dedication to Organizational Openness* between 1993 and 1996. Another four agencies reported a significant increase in "staff training" between 1993 and 1996. One of these four agencies also reported an increase in "management priority on openness" between 1993 and 1996. Interestingly, the remaining two agencies reported a significant decrease in "commitment to diversity at the top" and the "management priority on organizational openness".

For Construct 3 (*Bringing Down Barriers to Hiring/Promoting*), in 1996 the staff of all nine agencies confirmed their original beliefs (revealed in the 1993 survey) that they would not have difficulty having a "supervisor with a different ethnic background from their own".

For Construct 4, none of the nine agencies' staff reported a significant change (neither increase or decrease) in level of "personal priority on openness" between 1993 and 1996.

2.5 MOC's Impacts on Board and Staff Demographic Compositions

The available information precludes any conclusive comments on this issue because of low return rates in both the surveys (less than 60% for staff and less than 30% for board in the 1996 survey). "Eyeballing" frequency distributions of key demographic variables in the

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[8] Fourteen agencies participated in 1996 impact survey. But one agency had a tributary which was treated as an independent entity in this analysis.

base-line (1993) and the impact surveys (1996) revealed no discernable changes in *staff* and *board* demographic compositions: gender, level of formal education, spoken and/or written languages, age, religion, perceived visible minority status, and length of time in Canada. It is of note, that there was diversity among staff respecting ethnic backgrounds, religions and spoken and written languages. It is difficult to state whether or not the staff and board demographic compositions reflected the community in general. Lastly, the majority (80%) of staff members who participated in this evaluation were women both in 1993 and 1996. Aside from the hard data, perhaps three years is not long enough for agencies to change their staff compositions. But board members in these agencies have a relatively shorter stay. Therefore, board composition is a good indicator of organizational openness.

2.6 MOC's Impacts on the Consumer Populations

Lastly, there is some evidence of a change in the consumer populations. Board and staff respondents reported that selected programs have more diverse ("somewhat diverse" and "much more diverse") consumers in 1996 compared to 1993. Having said that, the evaluators observed the struggles and energy these agencies had to put up to change their programs and services. There was a significant push for agencies to reassess their consumer population and to develop programs and services for previously unserved parts of the community. Table B-6 outlines why consumer populations are "more diverse", "the same" or "less diverse" in 1996 compared to 1993. Clearly, there is a need for agencies to critically assess how their programs may meet the needs of unserved communities. For example, a program for teenage mothers should be accessible to all teenage mothers irrespective of their ethnic backgrounds, ability/disability status and so on.

3.0 Implications/Future Directions of the MOC Project

There were some negative comments about the MOC process, but the positive overwhelmingly outweighed the negative ones, prompting stakeholders to search for ways to solidify the gains made by this process, and continue MOC in some form.

By now it is quite clear that local context and dynamics are so critical that, no single or "canned" approach will work in all organizations. What an organization thinks of as the task of "accessibility" and how the following questions are asked and answered, determine the actions that follow. a) Is change a top-down or bottom-up process, or are both required? b) Can organizational change be mandated, or should it be voluntary? c) Can people be "made" to change? d) Do the personal experiences of organizational leaders lead to attitudinal changes, which then creates an environment which helps the organization to change? e) Should the change effort focus on attitudes, behaviours, or on skills? It is of note that these and many similar questions are not new to the MOC project. They were first raised at the inception and planning stage of the project.

3.1 Rationale for Retaining the MOC Project

Despite the glitches, problems and because of differential impacts, MOC left an important overall message that diversity initiatives and their evaluation have critical roles to play in Calgary's human services sector. Human Service organizations at least recognize that a significant part of the question of MOC's success has to do with the understanding of change that different individuals, groups and organizations hold. Organizations which typically started out thinking the problem was one of advertising, and that translating their communications into other languages would suffice, have begun to recognize the long-term nature of the problems of accessibility for all. The MOC initiative clearly revealed that tinkering with "external optics" rarely has any more than a superficial effect because the problem of culturally inappropriate services is much more complex.

The evaluators and the stakeholders identified the following key elements to better integrate the process into these agencies: goals/philosophy, training, policies for the individual agencies and evaluation of the MOC project.

3.2 MOC's Philosophy/Goals/Objectives

None of the concerns were about the objectives and goals of MOC: no one disputed the need for inclusive services and an equitable workplace. Criticism did centre on the methodology and the philosophical approach that was employed in the MOC training intervention for addressing diversity and exclusion issues. Some comments reflected a

concern that MOC, contrary to its stated aim of valuing all diversity, did not equally respect and value the concerns, values and experience of everyone in the agency. Comments about "reverse discrimination" clearly suggest some "mainstream staff" and board felt that supporting MOC would put their "Canadian" identity and privileges at risk. Some viewed the intervention negatively because MOC attempted to foster a change in the workplace relationships, a domain previously considered out of the bounds of external intervention. The member agencies were concerned about their autonomy because their funder, the United Way, was at the root of affecting these changes. Lastly, there were concerns about the time, energy and resources that MOC required. The advent of the Diversity Learning Institute (DLI) might have already mitigated some negative feelings because the United Way of Calgary and area is no longer leading the MOC process.

3.3 MOC's Training

The evaluators did not collect first-hand or primary data to determine the effectiveness of the training team or how the front line trainers were selected for the job. It was assumed that trainers were selected on the bases of the following skills and knowledge which:

a) reflect an analysis of power, privilege and oppression, at a personal level and as it relates to approaches to learning.

b) demonstrate self awareness. Trainers who have not dealt with the impact of racism and discrimination in their own lives may not be qualified to be trainers in this area.

To establish criteria for selecting trainers and then adhering to them is paramount for the success of the MOC project. This point has been raised here for the sake of completeness. The evaluators are well aware of the fact that these principles were discussed in-depth during the inception and planning phases of the MOC project.

3.4 Policy Initiatives

The findings of the evaluation indicate that along with support from key organizational leaders, effective training teams, a solid understanding of the organization's structures, processes, culture and individual skills, the organization does need to establish a clear policy framework for addressing and valuing diversity. These policies have the effect of clearly articulating, both internally and for the external community, how the organization has "internalized" its responsibilities and welcomes and addresses diversity as an ongoing part of its day to day processes.

Allowing racist or sexist action to continue within organizations creates problems for everyone in an organization, not just those with minority status. MOC clearly has helped build an awareness of inequity and diversity issues while helping support learning by all. Ultimately, the organization's culture should be able to immediately address such incidents and prevent their occurrence.

3.5 MOC's Evaluation

Intervention and training designed to affect organization behaviours, attitudes and values should undoubtedly be evaluated rigorously and regularly. The current evaluation was fraught with limited resources and did not have the luxury of using valid and reliable instruments. To date, no evaluators/researchers have developed an exhaustive (or even a comprehensive) reliable and valid instrument to gauge organizational diversity and its issues. Here are a few guidelines for future evaluators and students of diversity.

- Draw stratified random samples to capture the heterogeneity of the universe or the sampling frame accurately.
- Conduct a pilot test to estimate the variance in the population concerning key variables (e.g., gender, ethnicity).
- Ensure high return rates (i.e., approximately 75%).
- Generate short, reliable and valid instrument(s).
- Develop more holistic and sensitive instrument(s). While the four constructs (revealed through factor analysis) establish an important framework to study organizational openness, there is still a need to search for more items/tests to measure diversity accurately.
- Develop success indicators which measure cross-cultural successes of the intervention rather than focussing on a success perceived by certain sub-groups and not others. The Stanford-Binet IQ test generated in the early 20th century is a prime example of this kind of flaw in the test instrument. The test instrument (measuring IQ) itself was skewed towards the white population.

- Develop more qualitative approaches to capture the essence of a diversity intervention e.g., "naturalistic evaluation" [9].

3.6 MOC's Sustainability

The Stakeholders Group, convened March 19, 1997, discussed ways in which the MOC process could be made more sustainable. They had suggestions for funders, organization leaders and for the change process itself. They suggested that funders:

1. establish long-term, core funding for systemic change and not make funding dependent on short-term projects;

2. target funding toward community priorities and require evidence from applicants that their agency policies support accessibility;

3. develop funding and grant criteria that MOC, or similar systemic change initiatives, be focused on developing community capacities and be based on a participatory, community development approach; and

4. use their influence at the federal and provincial levels, with their colleagues in order that diversity matters are seen as a concern in the human services.

Stakeholders also suggested that MOC would have a better chance of longer-term sustainability if agencies:

1. were clear about their motivation for undertaking system change;

2. had a better understanding of their training needs;

3. developed internal training capacity so that diversity skills remain in the organization, rather than leaving when individual trainers left the organization or the process;

4. supported shared learning with others in their sector; and

5. understood that evaluation of the system change is critical to assess whether the process is actually making a difference to agency accessibility.

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[9] "An approach that minimizes...technical jargon, prior technical knowledge, statistical inference, the separation of the observer from the subject, the commitment to a single perspective, theoretical structures, experimental design, propositional knowledge -- sometimes causes. Instead there is a focus on the use of metaphor, analogy, informal (but valid) inference, vividness of description, reasons-explanations, interactiveness, meanings, multiple (legitimate) perspectives [and] tacit knowledge." Scriven, M. (1991). Evaluation Thesaurus (fourth edition). Sage Publication, Newbury Park, p. 240.

4.0 Conclusions

The following conclusions emerge from observing, listening and analyzing quantitative and qualitative data during 1990 to 1996. (See Appendix C for the time-lines and key steps during the seven years of the project.)

- Two clear messages emerged from the United Way of Calgary and area MOC initiative:
  1. Addressing the barriers to accessing human services, based on the dimensions of diversity which exist within Calgary, is a long-term and difficult undertaking, challenging participants both personally and organizationally. The challenges are multi-faceted for developing inclusive services with the broader community externally, as well as for staff wanting their organizations to be more open internally; and
  2. Despite numerous glitches and problems, and despite the differential impacts of MOC on the 14 participating agencies and the various sub-groupings of staff and board, the Evaluators found that the MOC intervention raised awareness that addressing diversity is critical for Calgary's human services sector.

- In Calgary (possibly in Canada as a whole) there is a need to develop more organizational change initiatives similar to MOC, as well as developing consciousness about the critical need to address equity and inclusivity - as a society, across the professions and individually. At the same time the stakeholders/key actors should recognize that diversity is a "public good" (i.e., diversity is good for all) rather than the domain of a particular sub-group, for instance visible minorities. Thus, the means of any such change process **are** the ends, and the process needs to be implemented in such a way that everyone's experience is accepted and respected. Therefore, participants from the mainstream/predominant sub-group should not come away with feelings of reverse discrimination.

- The four constructs (revealed through factor analysis) establish an important framework to study and measure organizational openness. **Freedom to speak up on sensitive issues**, is a measure of basic trust within the organization, while the other three factors- **management dedication to organizational openness**, **bringing down barriers to hiring/promoting**, and **personal dedication to organizational openness**, are key to a sucessful MOC change process. However, since diversity is highly complex with many variables and local contexts, there is still a need for more items/tests which measure diversity accurately.

- Yes, it is possible to evaluate the success of a project like MOC. But the qualitative or quantitative evaluation design must be culturally sensitive and objective.

- While this study has established some content and process criteria for assessing success in diversity interventions, until there is a more broadly agreed upon list of specific "benchmarks" and standards for measuring diversity intervention outcomes, most evaluations of diversity initiatives will likely be "naturalistic evaluations".

5.0 References

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6.0 APPENDICES

Appendix A

The Participants in the United Way MOC Process:

1. The MOC Committee (1991-1996)

Chair - Talib Nanji (Board Member)

Niels Agger-Gupta, Maria Astete, Barb Chang, Judge Cheryl Daniel (Board Member), Glynn Davis, Vinay Dey, Kathy Deyell , Pamela Dos Ramos, Linda Elefante-Thompson, Michael Embaie, Steffani Feleski (Board Member), George Kumi (1992-1994), Esther Lau, Gerri Manyfingers, Lal Narang, Pat Pardo, Charanjit Sanghera, Yvonne Stanford, Rosita Thorpe, Teresa Woo-Paw, Elsie Wuttunee (Board Member)

2. United Way MOC Staff

Wendy Charlton - Diversity Facilitator, MOC Project Development - 1995-1996,
Training Team Co-ordinator - 1993-94, Co-Co-ordinator 1994-95;

Narmin Ismail-Teja - Diversity Facilitator, MOC Service Development - 1995-1996,
Training Team Co-Co-ordinator - 1994-1995;

Carole Holmes - Multicultural Facilitator - 1991-1995;

Chris Montfort - facilitator / trainer / practicum student 1996;

Angie Salvo - Administrative Support - 1996 - 1997;

Susana Escobedo - Administrative Support - 1995 - 1996

Suphala Rao - Administrative Support - 1994 - 1995;

Mary Leung - Administrative Support - 1991 - 1993

United Way Barriers Analysis consultant (1991/92) - Julia Melnyk (Springboard Consulting)

3. MOC Committee Catalyst Connector Sub-Committee:

Hilde Houlding, Calgary Family Service Bureau,

Cathy Van Bavel, Distress Centre/Drug Centre (chair),

Yvonne Stanford, YWCA, Cluster 1 (chair)

Carol Oliver, Coalition on Family Violence/ Cluster 4

Romina De Silva, Cluster 4

Barb Chang, Technical Resource Centre, Cluster 2

Teresa Woo-Paw, Red Cross, Cluster 1

Carole Holmes, MOC Team

Wendy Charlton, Training Team,
Karen Whyte, Training Team
Niels Agger-Gupta, Alberta Multiculturalism Commission

4. United Way MOC Training Team

Co-ordinator(s) - Wendy Charlton, Narmin Ismail-Teja

Participants/Members - Kathy Briant, Richard Campbell, Doris Chabot, Kathy Deyell, Darcy Foggo, Gerard Halpin, Lisa Hari, Narmin Ismail-Teja, George Kumi, Lucretia Martenet, Donna McPhee, Sara Mitchell-Banks, Nomogugu Mgijima, Pat Pardo-Demiantschuk, Caroline Russell-King, Barbara Schleifer, Dawn Scott, Keith Seel, Jean Slick, Sylvia Waller, Teresa Woo-Paw, Karen Whyte, Niels Agger-Gupta and Carole Holmes

Train-the-Trainers (June 1993) Facilitators - led by Reva Joshee (RJ3 Consulting) and including Norma-Jean McLaren (42nd Street Consulting), Cecille dePasse and Julia Melnyk (Springboard Consulting).

5. Participating MOC Agencies and Clusters:

5.1 Cluster One (formed May 1992) - large agencies :

Boy Scouts of Canada - (Change Agents/representatives) - John Piera, Hugh Chalmers, Linda Maki, Ray Gayford;

Boys and Girls Clubs of Calgary - Myrna Lynder, Cheryl Doherty, Lois Bladon, Tim Veitch, Chandrika Mahadeva;

Canadian Mental Health - Trish Cameron, Elaine Eskow, Marg Osborne;

Canadian Red Cross - Jean Slick, Jackie Wright, Corine Frick, Teresa Woo-Paw, John DaSilva-Spence;

YWCA - Eva Friesen, Yvonne Stanford, Rosemary Lee, Dorothy Jones, Kerry-Lee Schultheis, Marcia Davis;

United Way of Calgary and area - Frank Johnston

Barriers Analysis Consultant - Rebecca Chan-Allen (Delta Learning Organization, Inc.)

5.2 Cluster Two (September 1992) - (medium and small agencies):
Calgary Birth Control Association: Susan Burrows- Johnson, Leslie Gavel;
Epilepsy Association: Kathy Fyfe, Roxanne LeBlanc;
Girl Guides of Canada: Bev Wahl, Patricia Verburgt;
Technical Resource Centre: Jim McLaughlin, Barb Chang;
Volunteer Centre: Martha Parker, Keith Seel, Georgette Thrasher

Barriers Analysis Consultant - Margery Knorr and Norma Farquerson

5.3 Cluster Three (January 1993) - five counselling agencies:
Calgary Family Service Bureau - Don Karst, Hilde Houlding;
Catholic Family Service - Greg Campbell, Jean Leong, Kathy Tyndale;
Distress Centre/Drug Centre - Jeanette McEachern, Cathy Van Bavel, Dell Stephens;
Jewish Family Service - Hope Kahane, Michele Doctoroff, Anna Sternberg;
Pastoral Institute- Robbie Babins-Wagner, Lois Heard.

Barriers Analysis Consultant: Brian Hoffart and Irene Hoffart (Synergy Research Group, Inc.)

5.4 Cluster Four (summer 1992) - developed somewhat independently of the first three - co-ordinated by Coalition on Family Violence co-ordinators: Romina Da Silva & Carol Oliver; and included:
Calgary Immigrant Aid Society - Hadassah Ksienski;
Calgary Immigrant Womens' Association - Linda Elefante - Thompson;
Calgary Women's Emergency Shelter - Susan Gardiner
Catholic Immigration Society - John Mungham, Fairborz Bairjanian;
Council of Sikh Organizations - Charanjit Sanghera;
Discovery House - Norma Peters;
Sheriff King Home (YWCA) - Fran Smith

Barriers Analysis Consultant: (1993 - funded separately by the federal department of Canadian Heritage) Julia Melnyk (Springboard Consulting Inc.)
(1995) Margery Knorr and Norma Farquerson

5.5 Cluster Five (created in 1995)

formed at the request of agencies dealing with people in trouble with the law, and included:

Alberta Seventh Step Society: Jim Osborne, Esther Jackson;

Elizabeth Fry Society: Michelle Clarke, Bev Frizzell, Barb Innes, Deborah Bartlett;

John Howard Society: Gordon Sand, Ian Cundliffe, Gladys Bolinski, Vern Fielder

Barrier's Analysis Consultant: Brian Hoffart and Irene Hoffart (Synergy Research Group, Inc.)

6. Circles Process

6.1 Change Agents Circle:

Pam Greer; Gerard Halpin, John DaSilva-Spence - (Red Cross)

Chandrika Mahadeva, Teri Adair, Monica Pohomann - (Boys & Girls Clubs)

Norma Cody - (YMCA)

Nadine Nesbitt, Lois Sutterland - (Calgary Legal Guidance)

6.2 Leadership Circle:

Myrna Linder - (Boys' and Girls' Clubs)

Susan Burrows-Johnson - (Calgary Birth Control Association)

Jean Slick - (Canadian Red Cross)

Hope Kahane - (Jewish Family Services)

Danielle Aubry - (Calgary Communities Against Sexual Abuse - CASA)

Ed Johnston - (United Way of Calgary and area)

6.3 Facilitators Circle

Lois Bladon; Chandrika Mahadev - (Boys' and Girls' Clubs)

Suzzanne Rosebrugh; Cathy Van Bavel (Ghinescu) - (Distress Centre/Drug Centre)

Narmin Ismail-Teja; Chris Monfort - (United Way of Calgary and area)

Romina Da Silva - (Calgary Coalition on Family Violence)

Jessica Ayala; Marcia Davis - (YWCA)

Pat Pardo - (Canadian Mental Health Association)

Peggy Bevens - (Red Cross)

6.4 Resource Circle

Wendy Charlton, Brenda Aries, Valerie Barr, Christine Monfort- (United Way of Calgary and area)
Angela Stephen, Greg Bielecki,, Jim Connolly, John Da Silva Spence; Natasha Chetty - (interested community members)
Rebecca Chan Allen - (Delta Learning Organization)
Niels Agger-Gupta - (Alberta Multiculturalism Commission)

6.5 Quality Circle

Colleen Hauck, Liza Choi - (Canadian Red Cross)
Frank Johnston - (United Way of Calgary and area)
Lisa Chan - (Calgary Chinese Elderly Citizen Association)
Hildie Houlding - (Calgary Family Service Bureau)
Leverne Campbell - (YWCA)
Marva Ferguson - (CASA)

6. 6 Project Circle

Wendy Charlton, Narmin Ismail-Teja, Chris Monfort, Susan Escobedo - (United Way of Calgary and area)
Rebecca Chan Allen - (Delta Learning Organization)

7.0 Participants at the March 19, 1997 Stakeholders Meeting

held at Alberta Community Development - 301 - 11 Avenue S.W.

Teresa Woo-Paw - (Calgary Chinese Community Service Association)
Patricia Bond, Frank Johnston, Talib Nanji - (United Way of Calgary and area)
Wendy Charlton, Narmin Ismail-Teja, Chris Monfort - (Diversity Learning Institute)
Cathy Keough-Ghinescu - (Distress Centre/Drug Centre)
Hildie Houlding - (Calgary Family Service Bureau)
Susan Burrows-Johnson - (Calgary Birth Control Association)
Janet Wager - (YWCA)
Amal Umar - (Canadian Heritage -Government of Canada)
Philip Cox - (Plan:Net 2000 Management & Consulting)
Urmil Chugh - (Independent Consultant/Evaluator/Researcher and also Plan:Net)
Niels Agger-Gupta - (Alberta Community Development/ Evaluator)

Appendix B

Table B-1. MOC's Effects On Participating Organizations as Reported By Staff and Board: Results of Content Analysis

Theme	No of Comments =148
Positive Effects	
• Provided education/training/awareness etc. to staff and board members	45 (30%)
• Impetus to remove barriers in service delivery	24 (16%)
• Impetus to formalize diversity initiatives e.g. policy formulation, forum for discussion etc.	23 (16%)
• Impetus to make board and other volunteer composition more diverse	3 (2%)
• Impetus to allocate resources for diversity initiatives	3 (2%)
• Impetus to make staff composition more diverse	1 (1%)
	99 (67%)
Examples	
- "The process has invited people to unite in working towards one goal".	
- "Provides a forum for discussion and reflection".	
- "Made us look more closely at our policies and be sensitive to filling gaps that may exist as they relate to accessibility".	
- "Freedom to ask questions".	
- "Additional time available to deal with the issues".	
Negative Effects	
• MOC was a waste of time	6 (4%)
• MOC process was unethical	4 (3%)
• MOC promoted feelings of reverse discrimination	2 (1%)
	12 (8%)
Examples	
- "MOC is a joke. People of top management are all talk but no do."	
- "Just given lip services and not really committed to the process."	
- "Too many stats [which] gets away from goal to serve my community."	
- "We must be careful not to lose sight of who we are and where we came from. We must not forsake of our majority only for sake of a small minority."	

(Continued)

Table B-1. MOC's Effects On Participating Organizations, Reported By Staff and Board: Results of Content Analysis (Cont'd)

Theme	No of Comments =148
Little or no Effect on the Organization	
• **Organization still the same as before MOC**	**22 (15%)**
Examples *- "We were an open agency before the process."* *- "Our's is a far-seeing agency... before FutureWays."* *- "The agency has always accepted and aided the so called minorities."*	
Mixed Feelings about the Effects	
• **MOC had or could have had a positive effect on the organization BUT ....**	**15 (10%)**
Examples *- "When the purpose of the agency is somewhat ignored while staff get all caught up in MOC work... it leaves staff feeling divided, impotent, not good enough angry and isolated."* *- "Management commitment has been somewhat lacking because of ... the various other organizational and structural challenges we have faced."*	

Table B-2. MOC'S Effects On Personal Being/Lives, Reported By Staff and Board: Results of Content Analysis

Theme	No of Comments =154
Personal Gains In	
• Knowledge/Understanding/Education /Learning etc.	23 (15%)
• Awareness/Validation/Solidification of Views	21 (14%)
• Creates Opportunities	20 (13%)
• Self Examination/Evaluation	15 (10%)
• Positive Work Environment	9 (6%)
• Personal Growth	9 (6%)
• Personal Openness	5 (3%)
• Tolerance/Acceptance/Respect	5 (3%)
	107 (69%)
Examples:	
- "Happy to work with people who are comfortable discussing and addressing diversity issues in a knowledgable way."	
- "I am more aware of cultural differences. I have become more proud of my ethnic background."	
- "I feel lucky to be able to examine my own privilege and racism in order to change.."	
- "Easier to handle interpersonal differences."	
- "Better able to deal with issue that client brings to therapy."	
- "I feel more comfortable counselling clients from other cultures."	
Personal Loss	
• Feeling Left Out/Reverse Discrimination	5 (3%)
Example	
- "My culture and background for more than 200 years is Canadian. I would like to be recognized too. I like multiculturalism and diversity, but I would like to be included as well and not always giving up my traditions."	
Personally No Gain No Loss	
• Still The Same	25 (16%)
Example(s):	
- "I'm still the same."	
- "My work has nothing to do with MOC .... Personally, my opinions have not been influenced by the change."	
-"I have always been able to work with people whether they had different sex orientation or race.."	

(Continued)

Table B-2. MOC'S Effects On Personal Being/Lives, Reported By Staff and Board: Results of Content Analysis (Cont'd)

Theme	No of Comments =154
Mixed Feelings	
• **MOC Was Good ....BUT** ***Example(s):*** ***- "MOC has impacted my life and it is difficult [because] ... the agency has not moved to the same degree.."*** ***- "I do not believe in forcing an outside process on an organization."***	**11 (7%)**

Table B-3: MOC'S Effects on Professional Practices, Reported By the Staff: Results of Content Analysis

Theme	No of Comments =68
Positive Effects	
• Increased services to a diverse consumer population	15 (22%)
• Increase in knowledge, awareness, deeper understanding etc	14 (21%)
• Impetus to interact with other professionals ie. promoted inter-disciplinarity	8 (12%)
• Provided skills to change (or fine tune) professional practices	6 (9%)
• Created more demand for experts to practice in the area of social services/created employment opportunities	5 (7%)
• Provided impetus to change educational institutional (e.g., curriculum) regarding diversity and related topics	3 (4%)
• Provided impetus to make diversity an area to learn in social work and services	1 (1%)
• Provided impetus to change some aspects of professional associations	1 (1%)
	53 (78%)
Examples	
- *"I feel that there is a great number of ... students who will join our program."*	
- *"There are more demands for professionals such as myself with expertise, skills and language to deal with other cultures."*	
- *" I see changes in the School of Social Worker's curriculum related to diversity. ASSW conferences have also reflected that."*	
- *" Interaction of agencies bring motivation to be aware and deal with [diversity] issues."*	
- *" Have changed the way I do therapy."*	
Little to No Effect	
• Professional services and education still the same	9 (13%)
Examples	
- *" The majority of clients are still white, English speaking Canadians."*	
- *" Minimum changes at professional levels."*	
- *" I found the professions have been cognizant of multicultural issues prior to MOC."*	
Mixed Feelings	6 (9%)
• MOC could have been good/positive ... BUT	
Examples	
- *" My profession is struggling to survive."*	
- *" Less resources for clients, more different problems to deal with."*	
- *" Community professionals talk about ... funding not necessarily clients."*	

Table B-4. MOC'S Effects On The Community-at-Large, Reported By Staff and Board: Results of Content Analysis

Theme	No of Comments =97
Positive Effects	
• Service agencies more open/accessible/decreased barriers	21 (22%)
• More partnership and collaboration in the community	15 (15%)
• Evidence of sensitivity/awareness/education	8 (8%)
• Hiring practices	1 (1%)
	45 (46%)
Examples	
- *"The message is getting out and people are seeing the benefits of diversity."*	
- *"Seen many more offers of collaborative efforts between agencies and a great deal of discussion in regards to mutually beneficial alliances."*	
- *"More culturally sensitive services offered."*	
- *"Hiring practices -- looking at diversity as an advantage not a liability."*	
Positive Confounders	
• Government policy	2 (2%)
• Change in curriculum/changes in other health care system	1 (1%)
	3 (3%)
Examples	
- *"Government policies dictate that minorities be served equally with the dominant groups."*	
- *"Changes to curriculum at U of C social work program."*	
- *"The biggest changes are in agencies outside of the FutureWays process e.g. Health Authority and Alberta Social Services. It would be presuming too much to assume this process has had any major changes in Calgary."*	

(Continued)

Table B-4. MOC'S Effects On The Community-at-Large, Reported By Staff and Board: Results of Content Analysis (Cont'd)

Theme	No of Comments = 97
Negative Effects of MOC	
• Reduction of services/decreased quality of services	5 (5%)
• All other issues forgotten	1 (1%)
• MOC was not handled well	1 (1%)
	7 (7%)
Examples	
- "Vulnerable people are not receiving services previously available to them."	
- "See a lot of anger among staff of non-profit agencies against United way."	
- "I have seen services cut rather than improve."	
- "In the process of transformation there has been a reduction (overall) in the availability of some services."	
Negative Confounders	
• Funding cut back	13 (13%)
• Lack of resources	14 (14%)
• Mainstream thinking	1 (1%)
• Lack of government policy	1 (1%)
	29 (30%)
Examples	
- "I think funding cut backs has had a greater [negative] impact."	
- "All of the cut backs seem to have services less available than before."	
- "Mainstream thinking still interferes with diversity implementation."	
None to Little Effect	
• Community still the same	8 (8%)
Examples	
- "I have not seen the change"	
- "Nothing noticeable – still many barriers to clients"	
Can't Tell/Can't Assess	
• Can not be sure if MOC made any difference	5 (5%)

Table B-5. Four Factors Extracted from Responses to 22 Items in 1996 Survey: Results of Exploratory Factor Analysis

Factors/Items
Factor 1   ***Freedom to Speak up on Sensitive Issues***   **1. There is confusion about how to communicate with people who appear different**   **2. People are not treated fairly because they appear different**   **3. I hear racist remarks in my organization**   **4. My co-workers need to be more understanding of how people in minority groups feel**   **5. I hear sexist remarks in my organization**   **6. There is conflict when diversity issues are raised in our organization**   **7. Clients/consumers with specialized needs expect services which agency can not provide**
Factor 2   ***Management Dedication to Organizational Openness***   **1. There is an overall plan to deal with diversity issues in our organization.**   **2. How high a priority does your management place on increasing organizational openness?**   **3. There is commitment to change at the top of the organization.**   **4. Staff have created an open forum for discussion.**   **5. There is adequate training for staff to deal with diversity issues and needs.**   **6. Our agency only thinks of mainstream consumers when we advertise our programs.**   **7. My organization provides quality services to people of different backgrounds.**   **8. Staff are motivated to work together.**   **9. Staff know to whom they should refer clients/consumers with specialized needs.**

(Continued)

Table B-5. Four Factors Extracted from Responses to 22 Items in 1996 Survey: Results of Exploratory Factor Analysis (Cont'd)

Factors/Items
Factor 3   ***Breaking Down Barriers to Hiring/Promoting***   **1. I will have difficulty being supervised by someone from an ethnic group different from my own**   **2. I will have difficulty being supervised by someone from the opposite sex**   **3. I will have difficulty working with people whose sexual orientation is different from my own**
Factor 4   ***Personal Dedication to Organizational Openness***   **1. How high a priority do you personally place in increasing organizational openness?**   **2. Opening up the organization will make my job more secure.**   **3. I am too busy doing regular work to deal with diversity issues.**

Note: Except for items 2 in the Factor 2 and 1 in the Factor 4, the above items were elicited on a five-point agreement scale (1="Strongly Disagree" and 5= "Strongly Agree"). The other two items were elicited on a five-point priority scale (5 = "Top" and 1= "Not-at-all")

Table B-6. Why Did Consumer Populations Change or Not Change: Reasons Given by the Staff and Board in 1996 Survey

Why More Diverse In	No. of Comments	Why The Same In	No. of Comments	Why Less Diverse In	No. of Comments
Age Composition	42	Age Composition	17	Age Composition	1
• Change in nature of service		• Program specific to a target group		• Location	
• Cost of service					
• Additional funding to expand service					
Ability/Disability Composition	10	Ability/Disability Composition	13	Ability/Disability Composition	1
• Change facility		• Program specific to a target group		• Social structure	
• More recognition		• Accessibility			
• More accessibility		• Already diverse			
		• No support/focus from the organization.			
Gender Composition	23	Gender Composition	20	Gender Composition	7
• Organizational philosophy		• Program specific to a target group		• Special focus on a particular group	
• Demographic changes					
• Focus on ethnicity					
• Changes in values/attitudes					
Income Composition		Income Composition	15		
• Efforts by the organization	24	• Government policy		Income Composition	18
• Socio-economic forces		• Program specific to a target group		• Socio-economic forces	

(Continued)

Table B-6. Why Did Consumer Populations Change or Not Change: Reasons Given by the Staff and Board in 1996 Survey (Cont'd)

Why More Diverse In	No. of Comments	Why The Same	No. of Comments	Why Less Diverse	No. of Comments
Family Make-up Composition	25	**Family Makeup Composition**	14	**Family Make-up Composition**	1
• Reflecting the community		• Program specific to a target group			
• Outreach and promotion				• Just by chance	
• Social attitudes					
Language Composition	41	**Language Composition**	0	**Language Composition**	1
• Demographic changes		No Comments		• Not everyone needs the service	
• Minorities accessing services				• Lack of multicultural programs	
• Cross-cultural initiatives				• Staff lacking in diverse language	
Race/Ethnicity Composition	41	**Race/Ethnicity Composition**	2	**Race/Ethnicity Composition**	0
• Referral from other agencies		• Program specific to a target group		No Comments	
• Demographic changes					
• Outreach/publicity					
• More awareness all around					
Religion/Spirituality Composition		**Religion/Spirituality Composition**	0	**Religion/Spirituality Composition**	0
• Leadership	19	No Comments		No Comments	
• Demographic changes					
• Multifaith philosophy					
• Impartiality					
• Cross-cultural interaction					
Sexual Orientation Composition	24	**Sexual Orientation Composition**	0	**Sexual Orientation Composition**	0
• Attitudinal change		No Comments		No Comments	
• Publicity					
• Welcoming environment					

Appendix C

Time-Lines and Key Points in the United Way of Calgary and area MOC Initiative And its Evaluation

1990:

- United Way of Calgary identified the need to be more responsive to the broader community. Changing demographics led the Boards of the United Way and Member Agencies to review funding priorities. A Multicultural Task force suggested that United Way needs to develop a process to address the barriers non-white, mainstream Calgarians may have in accessing United Way services. This process led the United Way to create a board committee to oversee a multiple year pilot in multicultural change. United Way hires Carole Holmes to co-ordinate the MOC activities. The initial idea was that United Way would attempt internal change first and then work with member agencies with their newly-developed expertise.

1991:

- (April) Multiculturalism Commission (Niels Agger-Gupta) joined United Way's Multicultural Organizational Change (MOC) Board Committee as an advisor. MOC Committee with membership of 2 Board members and 14 community members, develops a vision and mission and strategic plan for their process.

- (Fall) United Way of Calgary conducted their internal assessment (barriers analysis) of obstacles and other inappropriate services for clients, staff of the agency and potential donors to the organization. AMC provides $10,000 for the internal barriers analysis(½ of the budget).

1992:

- (January) United Way of Canada designated Calgary's project as one of four model projects (Halifax, Toronto and Vancouver are the others) which will run for 3 years (1992-1995). The Kahanoff Foundation is providing over half the funds for Calgary's project. United Way has committed to the remainder of funding (over $600,000).

• (April) Board of the United Way invited Member Agencies to join the Multicultural Organizational Change process to participate in a pilot to address multicultural accessibility within the not-for-profit human services sector.

• (March) A report on the United Way's barriers analysis, Enlarging the Fabric, was produced by the external consultant who undertook the review with the MOC Committee.

• (October) **Multiculturalism Commission**, under the **Access** mandate, contracted with United Way of Calgary for year one of a three year pilot initiative to demonstrate an organizational change process addressing accessibility and barriers.

1993:

• 16 participating agencies (including United Way itself) work in clusters and develop a vision and implementation strategies for a barriers analysis and systems review. Organizational baseline survey begins to be implemented in agencies in clusters one and two. *[Note that the United Way of Edmonton was turned down for funding for a similar project from the Multiculturalism Commission because they wished to have their member agencies implement this kind of change but were unwilling to engage in this change process themselves.]*

• (Spring) Evaluators (Plan:Net Management and Consulting Network) and MOC Committee create an evaluation Stakeholders' Group made up of participating agencies, and (March) produce an Inception Report setting out the framework of the 1992-95 evaluation.

• (Summer/Fall) Baseline implementation of evaluation surveys, interviews, focus groups

1994:

• (January) Evaluators produce an Evaluation Baseline Report and a Findings Report

• (June) A 20 person training team was recruited and trained and intensive agency training begins.

- (Fall) Evaluation of MOC process, clusters, MOC Committee and stakeholders takes place

1995:

- (May) Evaluators produced the MOC Evaluation Report, which reports that MOC has "substantially achieved its goal...After three years, most participants conclude, the effects of MOC are only now beginning to take hold." This report also wrapped up the Kahanoff Foundation's participation in the MOC process across Canada. One key finding is that Carole Holmes, the MOC Co-ordinator, had played a critical role in advocating for MOC and for educating and supporting the various participating agencies and key individuals through what was clearly a difficult process. Carole Holmes made a presentation to the Alberta Multiculturalism Commission Board about the MOC system change work
- United Way re-orients its financial assistance programs to support partnerships between "mainstream" agencies and ethnocultural communities to serve "new" communities; organizational development support to vulnerable groups; and, for the first time in Calgary, ethnocultural agencies engaged in social support work (such as Calgary Chinese Community Service Association).
- Agencies report feeling the impact of provincial constraints and cuts to the human services sector - participating agencies request postponing the second implementation of the evaluation to 1996.
- Carole Holmes, the United Way MOC Co-ordinator leaves project in September, leaving a major void in the initiative's direction. Wendy Charlton and Narmin Ismail-Teja, the Training Co-ordinators, job share the Coordinator's position.

1996:

- Agency work continues with an additional 20 participating agencies who are working on accessibility training.
- (February) Implementation of a re-designed survey to test the baseline with agency staff.
- (June/July) The Evaluators provide workshops back to the 14 participating agencies on the outcome of the 1996 survey.

1997:

- The Evaluators, working with the original 1992/93 Evaluation Stakeholders Group, complete the analysis of the comparison between the 1996 and 1993 evaluations and produce an Executive Summary of the Evaluation in July. The final, complete document with all the data, findings, instruments, etc. will be available in mid November.

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